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ABSTRACT

A pamphlet, intended to help Indian communities select executive directors for community organizations, summarizes information from a seminar on executive search and selection, sponsored by the Community Board Training Project (CBTP) of the Native American Educational Services (NAES) College. A chapter on the search process addresses the formation of search committees and how to advertise a job announcement. The section on questionnaire development covers background information necessary before the questionnaire for candidates is developed, differences between weighted and non-weighted questionnaires, and types of questions to avoid. A section on interview techniques discusses creating a positive interview environment and the interviewing process itself, including ways of asking questions and a list of probe phrases for eliciting more information. The chapter on executive director selection includes sections on selection as a basic personnel function, organization priorities and selection criteria, social and psychological factors, and decision making. A sampling of 12 questions raised at the seminar with answers by presenters and other panel members is provided. Brief background descriptions of the five American Indian presenters, a list of participating Indian community organizations and programs, and information on CBTP and NAES are included. (MH)

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Proceedings of a Seminar

January 31, 1981

Sponsored by:
Community Based Training Project
NAES College
410 N. Pershing
Chicago, IL 60622

PREFACE

A primary responsibility of Boards of Directors for community organizations is the selection of an executive director to lead the organization. Many boards enter the process without adequately preparing themselves for the journey ahead. Indian communities must especially concern themselves with this process since they are looking for a very specialized Indian person in a pool of highly-sought individuals.

This book presents a synopsis of the information exchanged during a seminar devoted to this task entitled *Executive Search And Selection*, which was sponsored by the Community Board Training Project, NAES College, on January 31, 1981.

Four American Indian consultants, experienced in community service work, led the seminar through discussion and group activity. A summary of their presentations and some of the questions asked by the participants follow.

Special thanks go to the United Way of Metropolitan Chicago and the Chicago Community Trust. Their support made this seminar and publication possible.

ABOUT THE COMMUNITY BOARD TRAINING PROJECT

The Community Board Training Project (CBTP) is a community organizational training and development program which relies entirely upon the cooperation of the various Chicago area American Indian community organizations' Board of Directors, personnel, and resource people for the successful implementation of its services.

The project is devoted to the development of professional operational systems among Indian community boards and staff members. The improvement of their work capabilities will enhance the overall function and effectiveness of their affiliated agencies. This goal is sought through six different service approaches: 1) course seminars, 2) full day seminars, 3) summer institute, 4) independent workshops, 5) technical assistance, and 6) resource development.

ABOUT NAES . . .

Native American Educational Services, Inc. (NAES College) is an independent educational institution offering an academic program leading to the Bachelor of Arts degree for persons employed in American Indian programs and agencies. NAES operates with a full complement of faculty and students at four separate study sites: Chicago Indian Community; Fort Peck Reservation, Montana; Northern Cheyenne Reservation, Montana; and Santo Domingo, Pueblo, New Mexico. Central administrative offices are located at the Chicago study site.

Students bear a unique responsibility for their own learning at NAES/Antioch. There is a heavy reliance on independent study, in which students are expected to integrate their course learnings with the needs of the community, as exemplified by the students' work positions.

NAES' students work full time and attend college full time, both at the same time.

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SEARCH PROCESS

By Leroy Wesaw, Sr.

FORMING THE SEARCH COMMITTEE

This committee is an important step taken by the board of directors, as they are charged by the board and ultimately by the community, to secure a qualified person to fill the executive director vacancy.

The people on the search committee should be chosen on their knowledge of community needs, programs and future plans of the organization they represent. They should have the ability to dissect an applicant's resume, and determine if he or she has the qualifications needed to further the organization's programs.

There are many variables and options a search committee must look at, such as: Is the applicant prompt in meeting time limits? Has the applicant changed employment often, if so why? etc.

Following are seven steps which a board will generally follow in implementing an Executive Director search.

1. Designate a search committee. The committee is composed of board members and/or advisory board members, who ideally are not influenced by tribal affiliation or friendship. (The committee membership is determined by the Board of Directors.)

2. Develop a job description and begin posting and advertising in community and tribal newspapers. Also, use the organizational mailing list.

3. Receive resumes until the designated cut off day. Hold late applicants under a separate file. All applications should go directly to the search committee.

4. Hold a closed meeting of the search committee to rank resumes received. There should be no outside people (non-committee members) attending search committee meeting in which applications and resumes are being reviewed.

5. Candidates recommended by the search committee are interviewed by board members or a group designated by them.

6. The final selection is made by a predetermined body selected by the board of directors (preferably by the entire board itself).

7. If the board is not satisfied with any of the applicants, return to Step No. 2 and run the procedure again.

JOB ANNOUNCEMENT

The job announcement advertising the executive director's position must be as clear and concise as possible. It should present a clear picture of the organization, director's responsibilities and personal qualities preferred. The outline below is a common method of developing a job announcement for a director's position.

Position
General Description of the Organization
Responsibilities
Qualifications
Salary
Application Deadline Date
Send Resumes To:

The executive director is the chief administrative officer for the agency. She/he is responsible to the board for the efficient and effective administration of the agency. As the key employee, the executive director is responsible for the planning, procurement, rental and occupancy, maintenance, community services, financial planning and budgeting. Duties may include the following:

1. Administers the activities of the agency in accordance with the fiscal, personnel and other policies adopted by the board and applicable State and Federal regulations.

2. Keeps the board fully advised of the status of the affairs of the agency. This includes, but is not limited to, the submission of regular detailed reports to the board.

3. Advises and makes recommendations to the board on all matters requiring policy determination.

4. Represents the organization to the public.

5. Ensures that prescribed account books are maintained.

6. Appoints all staff in accordance with the adopted personnel policies.

7. Establishes and enforces regulations to implement board policies.

8. Authorizes disbursement of funds in accordance with established procurement policy.

9. Supervises and participates in the development and preparation of budgets, proposals and applications for submission to the board.

10. Directs the management and maintenance of all projects operated by the agency.

11. Performs such other duties as prescribed by the board.

The executive director must have authority commensurate to the responsibilities of the position, as well as a large degree of administrative discretion in carrying out policies.

He/she needs strong management skills including the ability to communicate effectively, orally and in writing, and the ability to analyze and solve problems. He/she also needs an understanding of the principles of the Indian agencies' concerns and functions, and a commitment to their achievement, as well as a keen understanding of, and sensitivity to, the special problems and needs of the people they service.

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QUESTIONNAIRE DEVELOPMENT

By Flo Wiger

The questionnaire provides the bridge or connection between the initial processes and the actual interview and the final selection. Consequently, the development of the questionnaire is critical as it should ensure continuity for the search process.

Certain background information is necessary before the actual instrument is developed:

A) Understand the difference between a search committee and a selection committee.

B) Make sure the job you are searching for is *really* the one you wish to fill.

C) Make sure the job description you are using reflects the understanding the committee has of the job.

D) Provide the candidates invited for an interview with knowledge of the agency, the agency's internal structure, the specific position and other factors such as interdependency with other organizations.

Keeping in mind the above information, the actual instrument should be constructed. There are two basic types of questionnaires;

1. *Weighted* - certain points or percentages are allocated to different areas; e.g., communication skills, background experience, education.

2. *Non-Weighted* - a straightforward question and answer situation where there is no particular amount or weight relating to individual questions.

There are certain types of question areas to avoid under Title VII of EEOC regulations. In most cases these areas do not relate to job performance. These include:

Age
Color

Race
National Origin
Marital Status
Religion
Sex
Arrest Record
Height and Weight
Credit References
Garnishment Record
Type of Discharge from Service
Child Care Problems
Contraceptive Problems
Plans to have children
Unwed motherhood
Transportation (unless job related)

Outside these areas the instrument should be developed in such a way that the committee will have access to appropriate information to assist them in making sound recommendations for the position. The utilization of a questionnaire will help to assure all candidates of equal treatment during the interview process and it will allow more objective criteria in the final selection.

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INTERVIEW TECHNIQUES

By Alice Liljegren

The interview process is an important part of the search for an executive. If planned and conducted with care, it can yield information not readily supplied by an applicant's resume. By the extensive use of probing techniques, a search committee can assess the dimensions of an applicant's values, feelings, attitudes, past performance, knowledge and skills.

PRIOR TO THE INTERVIEW

Creating a positive interview environment is particularly important. This extends beyond the actual interview session, which may take from half an hour or more. What is meant by a positive interview environment? Specifically, all the preparations leading up to the interview and any necessary post-interview arrangements constitute the total interview environment.

As a result of the interviews, an executive search committee wants to be able to compare the candidates as objectively and fairly as possible. To do this, any differences in the total interview environment ought to be minimized so that variances in responses genuinely originate from the candidates themselves, and not from differential situations.

Each candidate, whether from the immediate community or from out-of-town, should be afforded the benefit of careful preparation and treatment during the interview process. Again, this is to ensure that variances in responses are not contaminated by messed-up schedules, inappropriate questioning or unclear thinking about the needs of the agency.

Post-interview considerations are carried out as a basic courtesy to the applicant. It is important to give the applicant a positive view of the agency and its volunteer board. Who knows? Perhaps the top candidate will decline an offer. Then, you may want to make an offer to another candidate. If the interview experience and all its arrangements have been conducted

smoothly and courteously, this will be to the benefit of all.

Other ways in which a positive interview environment could be created were briefly reviewed, and a summary follows:

- Designate specific people to ask specific questions. This will avoid duplication and waste of time.
- Contact the candidates you want to interview. Explain what can be expected in terms of schedules, who they will meet with and/or where they will be at certain times.
- Contact references. Interview questions can be generated from this.
- Be thorough in arranging for accommodations, overnight or otherwise.
- Arrange to meet the candidate if she/he is coming from any distance.
- Arrange a schedule for the spouse, if necessary. Particularly if a couple is considering a move from a reservation to the Chicago area, the change is significant and it could be to the community's benefit if assistance or information is readily available, should it be requested.
- If possible, arrange for a social time with the applicant and search committee. This could provide a good opportunity to go over additional questions and concerns.

Most importantly, when the actual interview times and places are assigned, do designate beforehand who should bring closure to the interview and at what time. If individual members of the search committee are interviewing the candidate in a one-on-one session, then each should know at what point the session ought to end so that the schedule can be reasonably followed. On the other hand, if a group of people are together interviewing, then one of them should be designated to conclude the interview.

It will help to plan ahead of time how a concluding-like statement can be interjected at the appropriate time. Again, a smooth closure-like statement is one more way of controlling, in a positive sense, the interview environment.

INTERVIEWING

Again, at the risk of being unduly repetitious, it is important to understand the purpose and meaning of the questions prepared for the

interview. Why are they being asked? Will they give you specific evidence by which you can evaluate the candidate? Also, be sure that there is prior agreement as to who will cover specific questions during the interview.

Into the actual interview, attempt to be neutral. Don't suggest answers or ask leading questions. Watch your "body language," like rolling your eyeballs into your head if an unexpected or surprising answer is given to your questions, etc.

Don't ask whether a candidate means *this* or *that* (which is leading).

Do say, "Could you be more specific?"

Don't rephrase or summarize.

Do say, "In what ways would you like to _____?"

Don't ask the candidate if she/he meant a particular thing by a certain word.

Do say, "Tell me a little more about _____."

Probes

Try to be creative. It's easy to fall back on the same phrase over and over again. Sometimes this can be remedied if you have a little notecard handy, on which are written some phrases you can use to elicit more information from the interviewee.

It's not always necessary to verbalize questions. Silence can serve to elicit further responses. Glance expectantly at the candidate if you would like additional comments from her/him.

Here are some handy phrases you can use for open probes, which may be used to encourage the candidate to open up or discuss, in further depth, a particular point you want to pursue:

"Anything else?"

"What do you mean?"

"How is that?"

"Could you give me an example?"

"Could you be more specific?"

If a candidate gives an irrelevant response, PROBE. Repeating the question may be sufficient. If a candidate gives a vague or general answer, say "Could you explain that a little?" Unless you feel differently, you need not explain words in a question. If it is appropriate, you can say, after such a request, "Whatever that means to you."

SUMMARY

The most benefit is gained from good interview techniques when the environment within which the interview will take place has been pre-planned. Putting your candidates at ease will enable you to fairly compare the interviewees so the best choice for the job at hand can be made. The interview probes, with a little practice, will allow you to draw out answers and responses from the candidates that should yield specific evidence that can help you make a good choice.

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EXECUTIVE DIRECTOR SELECTION

By Robert G. Archiquette

Selecting a director is the final step of the hiring process. This is also the most precarious step due to a host of issues and environmental influences. This section attempts to integrate all previous sessions on search processes, interview formats, and interview processes. Topics in this section are:

Selection as a Basic Personnel Function.

Organization Priorities and Selection Criteria.

Social and Psychological Factors.

Last, but not least, is the matter of When to Decide.

SELECTION AS A BASIC PERSONNEL FUNCTION

Selection is the last procedure in staffing the organization. After the long, expensive process of recruitment, interviewing, and the identification of candidates, the board must make a choice. This choice is usually defined as choosing the individual who best meets the selection criteria. This implies a pre-determined analysis of what an individual must have to perform the job. Thus, whoever best meets the demands of qualifications, job content, and pre-determined personality characteristics should be chosen.

Choosing the candidate on this basis is not entirely free of environmental constraints and circumstances. One commanding influence is the developmental state of the organization in terms of leadership skills, complexity, and flexibility. Another influence is government regulations and funding source suggestions on qualifications and equal employment opportunity. Another influence is labor force availability — people available who prefer to perform the demanding tasks of executive directors in community organizations. There are many other influences, controls and constraints, and each has an impact on establishing the criteria for an executive director.

The most widely used approach to making a fair decision is a systematic, somewhat rational process. A systematic approach that establishes selection criteria *before* a decision is made is the most effective approach. The most commonly used practical tool to make a decision is the "paired companion technique." Certain requirements for the job

are identified such as education, experience, personality characteristics, etc. . . and candidates are compared on what's desired. The candidate who receives the highest rating gets the job. The systematic approach is effective, but only if great care is taken in establishing the criteria.

ORGANIZATION PRIORITIES and SELECTION CRITERIA

Criteria such as education, experience, knowledge, etc. need to be considered with respect to the organization as a whole. All organizations have a way of changing over time. They tend to progress from very simple operations with a single task to highly complex bureaucracies. The stage at which your organization is functioning has a major influence on what you require of an executive director. In a simplistic stage all you may need is a technician. In the advanced bureaucratic stage, you may need someone with much experience, education, and emotional well being. At certain stages "developers" are necessary, and in later stages they may not function as well. On the other hand, some professionals tend to be dissatisfied in simplistic organizations.

SOCIAL AND PSYCHOLOGICAL FACTORS

With a developmental and environmental assessment you are better equipped to establish specific selection criteria. However, making the choice is not without a process of psychology.

One powerful force at work is that of group conformity. This refers to the problem of the unanimous decision, social perceptions, and the subtle practice of Indian stereotyping. Conformity by unanimous decision means that important opinions and concerns do not get discussed . . . it is better to go along with what everyone wants instead of oppose. Conformity by social perception means that the quality of the candidate is determined almost entirely by first impressions . . . which may often be erroneous. Conformity by Indian stereotyping is a subtle practice that borders on employment discrimination. It seems that Indian candicates must not only be tribally identified, but also be rated quite subtly as to type of Indian (apple, radish, etc.). Thus, choosing the candidates despite a sound selection criteria is often strongly influenced by the problem of conformity.

Conformity of a psychological nature can be offset substantially by considering the developmental state of the candidates' career. Since careers as well as organizations have life cycles it could be wise to assess the candidate's progress in order to gain a more realistic appraisal for selection purposes.

Early career stages are characterized by the candidate's image of what the job should be based on executive stereotypes as opposed to reality.

An *established career* stage is characterized by progress through reality shock, orientation stress and anxiety, to acceptance by other employees and the community. *Mid careers* are characterized by maximum productivity, prestige, status, and interestingly a self-appraisal that leads to new directions. *Later careers* are characterized by community involvement and the teaching of others. New sources other than the job are sought for self-improvement. Assessing a candidate's career progress helps to overcome the problems of conformity.

Given those problems and approaches you are still faced with more psychological factors. One is the perception of threat and the other is related to *after* a decision is made. As you may have experienced, attempts to interview well-educated candidates can be a threatening experience. A major source of threat feelings is that of language differences. "Big words" and professional jargon may not be understood by those who must decide. This may result in considerable anxiety and increased tension. This resulting tension and anxiety makes it harder to arrive at a sound decision. Thus the more "threatening" a candidate is to your need to feel comfortable . . . the less likely that candidate is to get the job.

The other factor is related to *after* the decision is made. The issue of when to decide is forthcoming but knowledge beforehand is helpful. Once a decision is made, especially one that is challenging and risky, you are likely to experience another kind of psychology which comes in various phases. In the case of the executive director you will likely experience a brief period of relief . . . "the job is done at last and now we can rest." A second phase is characterized by doubt and a re-evaluation of other alternatives that were previously available but not anymore. There is no real objective basis for these feelings and in most cases, the newly hired director has done nothing to deserve them. A possible phase is that of regret; "Oh, we should have never hired that person!" A single, minor tactical error results in an outcry of protest and regret.

WHEN TO MAKE A DECISION

It's imperative that the board make a thorough analysis of the influential environment. In relation to that analysis the board must also assess its own developmental state as a whole and determine new directions. The selection criteria must then be established and an appropriate fair interview plan and structure must be adopted. The search process must yield at least three candidates in order to make the best comparisons from the available labor force. When all these factors and processes are in operation . . . you are ready to make a decision.

QUESTIONS and ANSWERS

Throughout the seminar the participants raised numerous questions in an attempt to apply to their own organization the principles presented. This section includes a small sampling of the questions raised. Each question was answered by the topic presenter and/or other panel members.

Q: *Did you say the executive director makes all policies?*

A: No. Policies are set by the board. The director enforces the policies that are adopted by the board.

Q: *When you put down qualifications, unless years of experience is specified, do they just usually stick with a degree or what?*

A: Again, that's an option. What is the agency looking for? If they are using federal dollars, what does the federal criteria ask for? If they are using state dollars, what does the state criteria ask for? It depends on the position and type of agency.

Some state regulations say a masters degree or so many years of associated work in the field.

COMMENT: Panel Member

It would probably depend on the nature of the agency too. If your agency is child centered, dealing with counseling or child welfare, you would want skills in that field. If it's a health agency, you may want a person with a background in the health field.

Q: *I would like to know what you do with resumes received once the position has been filled and the search has been completed? Can you disperse them to other agencies? Can I keep them for the next ten years? Draw on them whenever I want? What is my responsibility?*

COMMENT: Panel Member

I believe that is dictated by common sense. I don't think there is

anything concrete that is put down anyplace which says you should do this or you shouldn't do that. But I would say that in my experiences you should not disperse those resumes to anyone else unless you have contacted the individual and asked them, and that would be after the position is filled. I think it would be appropriate if you choose to keep the resumes. Some places actually destroy all the resumes after the search has been completed and the final selection has been made. If you are going to keep them, I would suggest that you keep them someplace under lock and key. It is inappropriate to have them laying around where anybody could go and look at them or have access to them. Resumes are very confidential information and the federal guidelines are quite precise about how the privacy act is enforced and what kind of information can be shared. You have to be aware it is private information and it's to be shared only with the appropriate committee and the people making the selection.

Q: *If you want an Indian person who understands the Indian community and cultures, how can we state that?*

A: Under qualifications, you can use terms such as "must have knowledge of" or "experience with," etc. You have to be careful not to violate equal employment opportunity laws by excluding people.

Q: *What if the applicant states he/she does have adequate knowledge about Indian people to fill the position?*

A: Then the board members should question him/her on that subject. Remember the board or selection committee must feel satisfied with the applicant's responses not vice versa.

Q: *Is there a guideline as to what information should be in a resume? When a lot of personal information such as age, children, spouse, etc. is included, what can you do about it?*

A: Different places will handle that differently. For instance, at one university I know of, if you turn a resume into them they have one person who does nothing but read resumes with a little bottle of white-out at their desk and that person whites-out any of those personal items. They get rid of the age, they get rid of everything, even marital information. Some people will say it's fair game if it's on the resume. My advice to you is don't take a chance. It's not worth it.

Q: *When you ask for a resume should you request transcripts from their university or not?*

A: It depends on the job that your advertising for. There are some jobs that you want the individual to have academic subjects knowledge in. In that case you ask them for transcripts.

Q: *In your opinion, is it better to get written references or to do it by telephone?*

A: The times I have been involved in that, we have telephoned before interviews. If a telephone check of a reference is going to be done, carefully phrase your questions.

COMMENT: Panel Member

Yes, that's true so you can have a comparibility between candidates.

COMMENT: Panel Member

Checking references is something that many community organizations overlook because of time. We can't continue to overlook it.

Q: *How many references would you ask for?*

A: Four is around the number that I usually see and go through.

Q: *Wouldn't it be a nice gesture to ask somebody if you could use their name as a reference in the first place?*

A: Yes. I recommend you never use somebody's name for a reference if you don't ask them first.

Q: *How is an interview suppose to go? Are we really suppose to be tearing this person apart? It seems like we are all trying to be negative. Like we were trying to find a flaw in their background.*

A: I remember distinctively saying to make the candidate feel at ease.

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PRESENTERS

Leroy Wesaw (Potawatomi), holds a B.A. Degree in Community Development from NAES. He is House Management Counselor for HUD, Indian programs. Leroy is an active member of the Chicago Indian community, contributing his services for a number of years.

Flo Wiger (Sioux), has an M.S. Degree in Education and Guidance/Counseling from North Dakota State University. She is the Director of the American Indian Learning and Resource Center at the University of Minnesota. She is an experienced workshop leader and lecturer.

Alice Liljegren (Micmac), has an M.A. Degree in Urban and Regional Planning, University of Iowa. She is with the United Way of Rock Island, Illinois, a bi-state agency. She is active in Indian community programs of the Quad Cities area.

Robert Archiquette (Oneida), holds a B.A. Degree in Community Development from NAES. He is a consultant in counseling with Green Bay area Indian educational institutions, developing cultural, social and psychological conflict resolution seminars for mental health clinics and public schools.

Louis Delgado (Oneida), M.A. Degree in Community Organization from the University of Chicago. He is the Director of the Community Board Training Project and served as seminar coordinator.

PARTICIPANTS

Seminar participants included representatives from the following American Indian community organizations and programs:

American Indian Health Services
American Indian Business Association
American Indian Center
Native American Committee
American Indian Brotherhood
St. Augustine's Indian Center
Native American Educational Services
Native American Support Program/UICC
Inter-Tribal League of American Indians

Some comments on the day's activities made by the participants were: "Excellent, but not enough time"; "Very promising information"; "The points were brought about in a very smooth way"; "There should be more full day seminars."

The seminar was excellent because the presenters were qualified American Indians, experienced in Indian affairs and community administration, and concerned for the prosperity of the American Indian people.

The presenters' comments were that they were very much impressed with the cooperation and enthusiasm of the group.

The seminars and workshops sponsored by the CBTP are developed from requests by the American Indian agencies which are concerned in the operation of their programs.